



JOINT ELECTRONIC COMMERCE PROGRAM OFFICE

7676 Old Springhouse Road
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Logistics EDI IPT

March 15, 1999

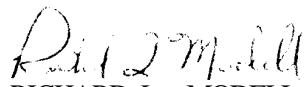
MEMORANDUM FOR: DISTRIBUTION

SUBJECT: Adoption of Commercial Electronic Data Interchange EDI Standards for DOD
Logistics Business Transactions - Integrated Product Team (IPT)

The next meeting of subject IPT will commence at 0800 on March 18, 1999 with adjournment at 1200 on March 19, 1999 at the Logistics Management Institute (LMI). McLean, VA. The tentative agenda is provided below (see Web site www.log.edi.migration.hq.dla.mil for administrative details). Attached for your review and comment are draft minutes and actions that resulted from the March 4, 1999 meeting. Subject to comment, the IPT Chairman will approve these minutes and actions on March 18, 1999. Point of contact is Mr. George Kingsley, (703) 767-0068, george~kingsley@hq.dla.mil.

Tentative Agenda:

<i>Information Briefings</i>	<i>Decision Topics</i>
0 Implementation Plan Sections (Section Leads)	• Funding Nominations
• EDI Policy Status	
• Testing	
• Architecture(s)	
• Chairman Updates - Actions 2-9-99-04, 2-9-99-06, 2-10-99-01 2- 1 0-99-02, 3-4-99-0 1, 3-4-99-03	


RICHARD L. MODELL
Lt Col, USAF
IPT Chairman

Attachments:

- Minutes of Meeting
- Attendees
- Action Items

Director, Joint Chiefs of Staff (JCS-J-4 [LISD])
 Director, Deputy Under Secretary of Defense for Acquisition Reform (AR)
 Deputy Chief of Staff, U. S. Army (LOIA-IT), (SAIS-IAE), (AMCLG-LA),
 (SFAE-PS-P), (Battelle [TP])
 Chief of Naval Operations (N41, N4T), (Cdr, Naval Supply Sys Sup Command [ED-12])
 Commandant, U. S. Marine Corps (LPS 1)
 Deputy Chief of Staff for Installations and Logistis, U. S. Air Force (AF/ILXI),
 (AFCIC/SYSS), (CAS Office [ILW]), (ILWR)
 Director, Defense Logistics Agency (DLA-CII), (DLA-CIO), (DLSC-I, DC, LCM),
 (DLIS-DL), (DAASC-SL), (JTAV), (DLMSO)
 Commander, U. S. Transportation Command (TCJ4-LP), (TCJ4-LPD)
 Commander, U. S. Special Operations Command (SOAL-LS)
 Commandant, U. S. Coast Guard (G-SLS), (Finance Center [SA])
 General Services Agency (FCSD), (FCSI)
 Director, Defense Finance and Accounting Service (IEC), (DFAS-HQ/A)
 Director, Defense Threat Reduction Agency (Logistics)
 Director, Federal Aviation Administration (AFZ 500)
 Director, National Security Agency (N315)
 Director, Defense Security Cooperation Agency (DSCA/IT/DSAMS-PMO), (911D24)
 Director, Veterans Administration (Logistics)
 Director, National Imagery and Mapping Agency (CSC DO D12)
 Director, Defense Commissary Agency (ITBB)
 Director, Defense Intelligence Agency (DAL-2)
 Director, Defense Information Systems Agency (JEBCD), (DT41), (D422)
 Director, Ballistic Missile Defense Organization (POI)
 Program Manager, Defense Medical Logistics Standard Support Program Office (DMLSS
 West), (JMLSS)
 Director, Department of Defense Ballistic Missile Defense Organization (POI)
 Joint Interoperability Test Command (JTDB)
 U.S. Postal Service (MDC)
 cc:
 Director, Assistant Secretary of Defense for Command, Control, Communication, and
 Intelligence (ASD)
 Deputy Under Secretary of Defense for Logistics (LSM), (MDM), (TP), (MPP&R)
 Director, Joint Electronic Commerce Program Office (CTC), (PTI)

Minutes
Adoption of Commercial EDI Standards
DoD Logistics Business Transactions, IPT, March 4, 1999

The IPT opened with the Chairman thanking everyone for attending. After administrative announcements, agenda review and introductions, the meeting activities began. Note: See IPT WEB page at www.log.edi.migration.hq.dla.mil for additional information.

DLMS/DLSS Enhancements: The purpose of this briefing was to provide the IPT with a general overview of enhancements associated with transitioning from the Defense Logistics Standard Systems (DLSS) to the Defense Logistics Management System (DLMS). The primary enhancement gained by transitioning to DLMS is the American National Standards Institute (ANSI)-chartered Accredited Standards Committee (ASC) X12 commercial standards. These standards are widely utilized throughout the civil sector and provide an excellent enabler as the Department moves away from its current proprietary eighty-card column EDI format. In response to a data call, the Services and Agencies submitted three hundred plus recommended enhancements. After the list was culled for duplicates and feasibility, more than one hundred were implemented into the DLMS. Enhancements that have had particular interest are the in-the-clear text capability and the ability to add additional data beyond the eighty-card column restriction. In-the-clear text has greatly enhanced non-standard material data identification. Data fields such as ordered-by, marked-for, multiple status recipients, etc., can be expanded to provide a full range of information. DLMS also provides the ability to provide multiple serial numbers without trailer cards. This enhancement has tremendous utility when shipping and receiving small arms. The briefing concluded with a short discussion of business rules. It was pointed out that as DLMS expands, business rules must be defined and agreed to by the trading partners. The IPT agreed that the facilitation of these rules is an enterprise (corporate) requirement. Regardless of the type EDI employed, the enterprise (corporate) must have in place a mechanism to define, document, and facilitate their implementation between trading partners.

DoD Electronic Commerce Mall (DoD EMALL): The DoD EMALL is an Internet requisitioning and ordering system broken into four corridors (functional views):

- Commodities corridor managed by the Defense Logistics Agency (DLA) – on line and operational today.
- Information technology corridor managed by the Navy – under development.
- Services corridor managed by the Air Force – under development.
- Construction corridor managed by the Army/Air Force – under development.

The primary advantage of the EMALL is convenience to the customer; yet represents only one mechanism for obtaining supplies and services. It was emphasized that with the advent and proliferation of credit cards, the DoD customer has a full range of purchasing options and is in position to shop for the best item at the lowest cost. For small requirements (10-15 items), the customer is served well by the EMALL and credit card purchases. For large volume and weapons system requisitioning, the DLSS/DLMS is the preferred method. Business rules for the use of the EMALL between Services and

Agencies was discussed. This discussion ended with the IPT agreeing that this was another example of an organizational requirement to work these type business rules at the corporate (enterprise) level. It was pointed out that there is an interface between EMALL and DLSS/DLMS that provides visibility at the corporate level. Unfortunately, there is no visibility of these transactions at the Service or Agency level. The last point made was that regardless of the system DoD utilizes, there are many small- and medium-sized civil trading partners that do not and will not have EDI capabilities. The Department must retain the flexibility to work individually with these providers (fax, email, web, etc.).

Service and Agency Briefing: As a result of scheduling conflicts, the General Services Administration (GSA) provided their briefing at this meeting as opposed to the February 9-10, 1999 meeting. Over the years, the use of DLSS/DLMS has steadily decreased amongst GSA customers. This decrease has been brought about by the increased utilization of credit card, Internet, and other technologies that are perceived by the customer as more responsive to their needs. The “GSA Advantage On-Line Shopping” system was initiated in 1996 and continues to evolve. This system provides the customer with in-the-clear text and addressing and is credit-card based. The briefer concluded by stating that GSA is a full partner with DoD as it moves toward commercial EDI standards. He went on to pose the following rhetorical question for the IPT to ponder:

- Is it bad that DLMS is not re-engineering? Maybe not.
- Can DLSS be re-engineered? Not in its current form.
- Can DLMS be re-engineered? Eventually, probably.
- Could re-engineering occur without DLMS as presently defined? Possibly.
- Would you want to?
- Could re-engineering occur without Federal Information Processing Standards (FIPS) 161-2 EDI? Not at this time.

Funding Nominations: The IPT requested an extension for providing funding nominations. The Chairman agreed and asked that any further nominations be provided not later than March 8, 1999. This topic will be added to the March 18-19, 1999 IPT meeting agenda.

Action Item Update: Due to communications issues, the approval of the February 9-10, 1999 meeting minutes was postponed to the March 18-19, 1999 IPT meeting. The following open actions were discussed: (See Attachment 3 for details)

<u>Action</u>	<u>Discussion</u>
1-9-99-01	The Army requested that this action remain open. Their chain-of-command is very interested in defining a positive ROI – even if associated with system modernization or process improvements.
1-9-99-02	Closed
1-9-99-03	Closed
1-9-99-04	Working
1-9-99-08	Closed

The following new action items were discussed (See Attachment 3 for complete action item listing):

- Establishment of a mechanism for IPT membership to propose agenda topics for future meetings.
- Coordination with the U.S. State Department and U.S. Customs Office as the IPT process moves forward.
- Training on DLSS, DLMS, or other IPT related topics for individuals or Service/Agency groups.

Service/Agency Implementation Plan Action Groups: This portion of the meeting opened with a philosophical discussion on the purpose of the Implementation Plan. The Chairman stated that the plan had two fundamental purposes. First, the plan must present a scheme to migrate DoD away from DLSS (MILS-type proprietary standards) and toward open international electronic commerce (EC) standards. Second, the plan must establish an enterprise (corporate – organization, standards, translation, etc.) structure to support the Service and Agency implementation requirements. A lengthy discussion ensued regarding the first purpose of the plan. The IPT split between requiring a definitive migration objective (ANSI-chartered ASC X12 standards) and leaving it to trading partners' discretion. At this point, since the membership could not propose any acceptable revision, the Chairman suggested, with unanimous support from the IPT participants, that the stated purpose remain unchanged. He went on to stipulate that if it becomes clear during the plan development that this issue requires revisiting, he would do so. With the conclusion of this discussion, the IPT members broke into action groups. The intent of these groups is to provide face-to-face meetings with Implementation Plan section leads, team members, and facilitators. The stated goal is to generally map out a "plan of attack", define roles, determine requirements, and prepare an informal brief for the IPT membership. Shown below are the results of these sessions:

<i>Section</i>	<i>Lead</i>	<i>Assisting</i>	<i>Facilitating</i>	<i>Synopsis of Break-Out-Sessions</i>
<i>New Systems</i>	Air Force	TRANSCON, DSCA	LMI	<ul style="list-style-type: none"> • Looking at requirement to acquire new systems with ability to utilize commercial standards that are: <ul style="list-style-type: none"> • Responsive to DoD requirements • Capable of adapting to emerging technologies • Enablers of business process improvements • Issues <ul style="list-style-type: none"> • Adoption of commercial EDI standards for weapon systems • Development of framework for commercial EDI standards – type, utilization, availability, etc. • Note: The group supported ANSI ASC X12 standards for transaction interchange • Group will continue dialog electronically

<i>Section</i>	<i>Lead</i>	<i>Assisting</i>	<i>Facilitating</i>	<i>Synopsis of Break-Out-Sessions</i>
<i>Legacy Systems</i>	Army	GSA, DSCA	DLMSO, PCCI	<ul style="list-style-type: none"> • Working definition of legacy system • Plan to identify inter-Service/Agency legacy systems planned for DLSS to DLMS conversion and develop a matrix with desired outcome being a conversion timeline • Fully supported the use of ANSI ASC X12 • Will begin work to develop uniform legacy system transition requirements to guide the Services and Agencies in making decisions as to the feasibility of migrating from DLSS to DLMS • Would like policy completed to enable the Services and Agencies to provide guidance to their Program Managers • Group will continue dialog electronically
<i>Implementation Mgt</i>	DLA	DLIS, DSCA, JTIC	DLMSO, PCCI	<ul style="list-style-type: none"> • Focus is on business process improvements • Will develop criteria for implementation • Determined that there was a requirement for a system evaluation process. A set of criterion should be used for the management decision making process. • Sees DLMSO as the logical office to: <ul style="list-style-type: none"> • Develop business rules • Monitor standards • Serve as the focal point as new technologies are developed • Volunteered to develop Appendix E • Group will continue dialog electronically
<i>Operation Mgt</i>	Navy	Coast Guard, USPS, Air Force	DLMSO, PCCI	<ul style="list-style-type: none"> • Will continue to meet face-to-face • Began work on outline with the goal of developing a skeleton • Some discussion regarding taking on Appendix N
<i>Appendix A Operating Concept</i>	USMC	MEDLOG	LMI, DLMSO	<ul style="list-style-type: none"> • Discussion regarding combining this group with operation management group or Appendix B • The Chairman agreed to contact the USMC to determine their ability to independently support this group

<i>Section</i>	<i>Lead</i>	<i>Assisting</i>	<i>Facilitating</i>	<i>Synopsis of Break-Out-Sessions</i>
<i>Appendix B Architecture</i>	DLA	DISA, DAASC, JTAV	DLMSO	<ul style="list-style-type: none"> • Will utilize the C4I architecture framework • Concentration on technology, operations and systems • Suggested that Appendix A be combined with their group • Group will continue dialog electronically

The Chairman mentioned that to fully exploit the action group concept, each of the Services and DLA needed representation on each of the action groups. He also stated that from a practical perspective, the support group (facilitators) could provide much of the administrative requirements associated with serving on an action group (writing, researching, coordinating, etc.). The meeting adjourned with the Chairman thanking all attendees and reminding them of next meeting scheduled for March 18-19, 1999.

Attendees
Adoption of Commercial EDI Standards
DoD Logistics Business Transactions, IPT, March 4, 1999

<i>Army</i>	<i>Navy</i>	<i>Air Force</i>	<i>USMC</i>
Mr. Carey	Mr. Minnick	Ms. Larson	Ms. Matsumoto
Ms. Spry		Lt Col Mihalcik	
Ms. Akins		Maj Barnes	
MAJ Nelson		Maj Wissel	
		Mr. Carlson	
		Mr. Westergard	
		Maj Richard	
		Mr. Farenillo	
<i>JCS</i>	<i>DLA</i>	<i>TRANSCOM</i>	<i>Coast Guard</i>
Mr. Brensy	Ms. Broussard	LTC Perry	LT Copeland
	Ms. Pavlik		
<i>SOCOM</i>	<i>GSA</i>	<i>DFAS</i>	<i>FAA</i>
	Mr. Hood	Ms. Abejuela	
		Ms. Hughes	
<i>NSA</i>	<i>DSCA</i>	<i>DeCA</i>	<i>MEDLOG</i>
Mr. Hobles	Mr. Freedenthal		Ms. Agnew
	Mr. Goldstein		
	Ms. Taylor		
<i>DUSD(L)</i>	<i>JTAV</i>	<i>LCM</i>	<i>DLIS</i>
	Mr. Soechtig	Mr. Klovstad	Mr. Behrendt
<i>DAASC</i>	<i>DISA</i>	<i>Acquisition Reform</i>	<i>DLMSO/JECPO</i>
Mr. Brown	Mr. Law		Mr. Yeakel
Mr. Scott	Mr. Hayes		Mr. Johnson, James
	Mr. Kye		Mr. Osterhus
<i>JITC</i>	<i>DLIS</i>	<i>USPS</i>	Lt Col Modell
Mr. Lynch	Mr. Behrendt	Mr. Ellison	Mr. Fitzhugh
			Mr. Creedon
			Mr. Pipan
			Ms. Burns
			Ms. Savage
			Ms. Johnson
			Mr. Thomas
			Ms. Hilert
			Mr. Egan
			Mr. Crawford
			Ms. Amyx
			Mr. Kingsley
			Mr. Gower
			Mr. Lewis
			Mr. St. Mark
			Mr. Graham
			Mr. Johnson, Lenny

Action List
Adoption of Commercial EDI Standards
DoD Logistics Business Transactions, IPT, March 4, 1999

<i>Number</i>	<i>Action/Comments</i>	<i>Suspense</i>	<i>Lead</i>
1-20-99-01	Approve IPT Charter - <ul style="list-style-type: none"> IPT members will review and provide comments by 2/5/99 to Mr. Jim Lewis (project facilitator). Mr. Lewis will incorporate changes as appropriate and brief for approval at the 2/9-10/99 IPT meeting. Incorporate changes received during previous staffing and during meeting. Post to WEB with suspense for input by 3/1/99. Present for signature to Director JECPO and DUSD(L)(LSM). Include as a briefing point at the 3/5/99 LIB. DUSD(L)(LSM) signed Charter 3/8/99. Director JECPO signed Charter 3/12/99. Signed Charter posted to WEB. 	Completed	Chairman
1-20-99-02	Approve IPT Terms and Definitions - <ul style="list-style-type: none"> Mr. Lenny Johnson (project facilitator) will modify current terms and definitions to include source information by 1/21/99 and provide to IPT membership via the IPT web site. IPT members will review and provide comments by 2/5/99 to Mr. Johnson. Mr. Johnson will incorporate changes as appropriate and brief for approval at the 2/9-10/99 meeting. Will continue to update IPT membership through WEB and during meetings. - Will review Charter, Plan Outline, Policy to ensure completeness of document. - Will transition to become “glossary of terms” in final Implementation Plan. IPT Chairman will define the term DLMS to encompass other emerging technologies that may have future application to the overall EDI effort. 	Ongoing Ongoing Completed	Chairman

<i>Number</i>	<i>Action/Comments</i>	<i>Suspense</i>	<i>Lead</i>
1-20-99-03	<p>Approve Implementation Plan Outline -</p> <ul style="list-style-type: none"> • Mr. Mark Crawford (project facilitator) will modify current Implementation Plan Outline with a sentence or two for each major heading and provide to IPT members by 1/28/99. IPT members will review and provide comments by 2/5/99 to Mr. Crawford. Mr. Crawford will brief for approval at the 2/9-10/99 meeting. • Chairman will assign Action Group leads for developing the following sections of the Implementation Plan: <ul style="list-style-type: none"> • Part 1-Introduction • Part 2 – DLMS Implementation Plans <ul style="list-style-type: none"> • New Systems (separate group) • Legacy Systems (separate group) • Part 3 – Implementation Management Plans • Part 4 – Operation Management Plans • Appendix A – Operating Concept • Tasking will include a “data call” for each of the Services and DLA to identify by name Action Group leads and support members for each formed Action Group. In addition, Chairman will name IPT Support Group facilitator(s) for each Action Group. • Follow-up request sent to Services and Agencies for names of Action Group members. 	<p>Completed</p> <p>Completed</p> <p>Completed</p> <p>Completed</p>	Chairman
1-20-99-04	<p>Service and Agency EDI Briefings -</p> <ul style="list-style-type: none"> • Briefings will be provided in accordance with outline provided in administrative portion of the minutes above. Briefings by other IPT participants are optional. Time will be provided on the agenda to accommodate this option. 	Completed	Services and Agencies

<i>Number</i>	<i>Action/Comments</i>	<i>Suspense</i>	<i>Lead</i>
1-20-99-07	IPT Voting Members - <ul style="list-style-type: none"> Chairman will revisit (based on IPT comments) the issue of IPT voting membership and reflect his findings in the next iteration of the IPT Charter. 	Completed	Chairman
1-20-99-08	DoD EDI Translator Requirements - <ul style="list-style-type: none"> Pending appointment of an “action group,” IPT Chairman will begin to define/scope the DoD EDI translator requirement. This issue is inclusive of Corporate/Service/Agency requirements. 2/10/99 DLA and DISA agreed to co-chair an Action Group to define and begin the process of requirement determination. Mr. St. Mark will facilitate this action as a sub-task of the Action Group charged with developing Appendix B of the Implementation Plan. 	Completed Ongoing Ongoing	Chairman pending Action Group
1-20-99-09	IPT Non-DoD Issue Resolution - <ul style="list-style-type: none"> Develop a procedure, based on the fact that the IPT’s primary focus is on DoD EDI standards, on how non-DoD (GSA, NSA, NASA, etc.) elements will assist in issue resolution. 	Completed	Chairman
1-20-99-10	Civil Sector IPT Involvement - <ul style="list-style-type: none"> Develop a procedure by which civil sector EDI standards organizations can participate, advise, and consult on the IPT’s efforts. 	Ongoing	Chairman
1-20-99-11	DLMS/DLSS Enhancements - <ul style="list-style-type: none"> Mr. Don Egan will prepare a comprehensive list of enhancements that are present in DLMS, but not in DLSS. This list will be provided to the Chairman by 2/5/99 for review and briefed at the 2/9-10/99 meeting. Note: Hard copy of briefing charts provided as handout at 2/9-10/99 meeting. Briefing deferred to later meeting. Briefing given at 3/4/99 meeting 	Completed	Chairman

<i>Number</i>	<i>Action/Comments</i>	<i>Suspense</i>	<i>Lead</i>
1-20-99-12	NASA and USPS - <ul style="list-style-type: none"> For participation in the 2/9-10/99 meeting, the Chairman will invite NASA, USPS, and DIA to participate in the IPT process. 	Completed	Chairman
2-9-99-01	DoD ROI Studies – <ul style="list-style-type: none"> Research to determine relevant DoD logistics EDI ROI studies completed/ongoing/ contemplated and provide results to IPT 	Ongoing	Chairman
2-9-99-02	DoD Logistics priorities – <ul style="list-style-type: none"> Research to determine the relative priority of EDI migration to commercial standards within DUSD(L). 	Completed	Chairman
2-9-99-03	Migration Standard Capabilities – <ul style="list-style-type: none"> Research, compare, contrast capabilities of XML vice ANSI ASC X12, or other available logistics standards, and provide results to IPT. White paper is posed on the IPT web site. 	Completed	Chairman
2-9-99-04	IPT E-Mail Address - <ul style="list-style-type: none"> Establish an IPT “common” e-mail address. 	Ongoing	Chairman
2-9-99-05	IPT End-State – <ul style="list-style-type: none"> Research to determine a definitive “end-state” for EDI IPT. 	Completed	Chairman
2-9-99-06	Similar Efforts – <ul style="list-style-type: none"> Research to determine if similar efforts are ongoing within DoD/Non DoD Agencies. When applicable, add link to IPT WEB page. 	Ongoing	Chairman
2-9-99-07	“Oversight Organization” – <ul style="list-style-type: none"> In what will become a recommendation of the IPT, conceptualize and propose the “oversight organization” that will serve as the follow-on to this IPT. Major responsibility will be to oversee execution of Implementation Plan. 	Ongoing	Chairman

<i>Number</i>	<i>Action/Comments</i>	<i>Suspense</i>	<i>Lead</i>
2-9-99-08	IPT Scope – <ul style="list-style-type: none"> Assess the ramifications of expanding the implementation plan to include other enablers such as AIT, XML, e-mail etc. This action can be accomplished through the re-definition of DLMS. DUSD(L)(LSM) will be briefed on the positives and negatives of this expansion. Results were presented at the 3/4/99 IPT meeting. 	Completed	Chairman
2-10-99-01	Other Implementation Plans/Policies – <ul style="list-style-type: none"> Research to determine other plans, strategies, policies, lessons learned, etc., that should be referenced or tied to this effort. 	Ongoing	Chairman
2-10-99-02	Testing – <ul style="list-style-type: none"> Research and develop a strategy to determine future IPT testing requirements and test agencies to be utilized (Service and/or JITC). 	Ongoing	Chairman
3-4-99-01	Training - <ul style="list-style-type: none"> Subject to request the IPT Chairman is willing to provide training on DLSS, DLMS, or other IPT-related topics for individuals or Service/Agency groups. 	Ongoing	Chairman
3-4-99-02	Agenda Topics - <ul style="list-style-type: none"> Establishment of a mechanism for IPT membership to request agenda topics for future meetings. Added to WEB page 3/5/99. 	Completed	Chairman
3-4-99-03	Coordination - <ul style="list-style-type: none"> Coordination with the U.S. State Department and U.S. Customs Office as the IPT process moves forward. Chairman emailed U.S. Customs POC 3/11/99 inviting their participation in the IPT. 	3/18/99	Chairman